



# Campaign Planning Tools

*Planning is the most important step in running a workplace campaign. These two charts will help you get your campaign up-and-running in no time!*

## Sample Two-Week Campaign Calendar

	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.
Before Campaign	<ul style="list-style-type: none"> <li>Meet with United Way staff partner</li> <li>Plan workplace campaign (see critical path above)</li> <li>ECC/UCC and other key volunteers attend Campaign Training Workshop</li> </ul>						
Pre-Campaign (1 week before)		<b>Promote the Campaign</b> -advertise the payroll campaign & any events	<b>Train Canvassers</b>	<b>Leadership Presentation</b> 1-week prior to Kick-off to "set pace" and build momentum			
Campaign Week 1			<b>Host Campaign Kick-Off Event</b> <ul style="list-style-type: none"> <li>Agency speaker</li> <li>CEO remarks</li> </ul>			<b>Casual Day</b>  Early-bird <b>draw</b> for those returning pledge cards	
	Campaign canvassers personally deliver pledge packages & speak with each employee						
Campaign Week 2					<b>Campaign Special Event</b> <ul style="list-style-type: none"> <li>Chili cook-off</li> <li>Bake Sale, etc.</li> </ul> <b>Collect all pledge forms</b>	<b>Wrap-up Event</b> Announce success & thank every one	
	Continue to canvass						
Post-Campaign	<ul style="list-style-type: none"> <li>Collect last of pledge forms</li> <li>Follow-up with employees who were away</li> <li>Submit pledge cards and event dollars to United Way. Don't forget required copies to your payroll department.</li> </ul>						

## Sample Campaign Critical Path

	Activity	Task	Responsibility	Timing
<b>P L A N</b>	Planning	Meet with United Way staff partners		
	Learn about United Way	Take an agency tour or attend sessions with agency speakers		
		Review United Way Materials & Website		
	Build your Team	Identify committee structure		
		Recruit committee		
		Hold committee meeting/training		
	Analyze & Set Goals	Review history		
		Revisit strategies & goals		
		Identify areas of potential (e.g., retirees, new hires)		
	Develop Campaign & Leadership Giving Plans	Plan for kick-off & touchdown events		
		Plan for payroll canvass		
		Develop timeline for canvass		
		Recruit site coordinators		
		Recruit canvassers		
	Prepare	Preprint pledge cards		
		Gather endorsements from CEO and Unions (if applicable)		
		Package campaign materials		
	Develop a Promotion Plan	Gather background & materials		
Secure agency speakers				
Conduct canvasser training				
<b>E X E C U T E</b>	Promote	Circulate emails, posters, intranet, notice boards, etc.		
	Kick-off Event	Promote kick-off		
		Hold coffee break, BBQ or other kick-off event (include United Way staff partner & agency speakers)		
	Canvass	Canvassing by shift & department		
		Retiree canvass		
		Leadership canvass		
		New hires canvass		
	Special Events	Hold planned special events (ensure they don't compete with canvass)		
	Manage & Monitor	System/procedure to collect envelopes		
		Track employees to be canvassed		
Follow-up with canvass/team leaders				
<b>W R A P - U P</b>	Thank Everyone	Thank committee		
		Thank canvassers		
		Announce results-thank donors		
	Evaluate & Report	Notify United Way of your success		
		Compare results to goals		
		Compare implementation to plans		
	Follow-up & Share Results	Follow-up with employees away during canvass period		
		Communicate final results		

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